

Past Performance & CPARS

Chuck Wingerter
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Overview

- Introduction
- Past Performance Information (PPI)
- How PPI is Utilized/Evaluated
- General Assessment
- Contractor Performance Assessment Reporting System (CPARS)

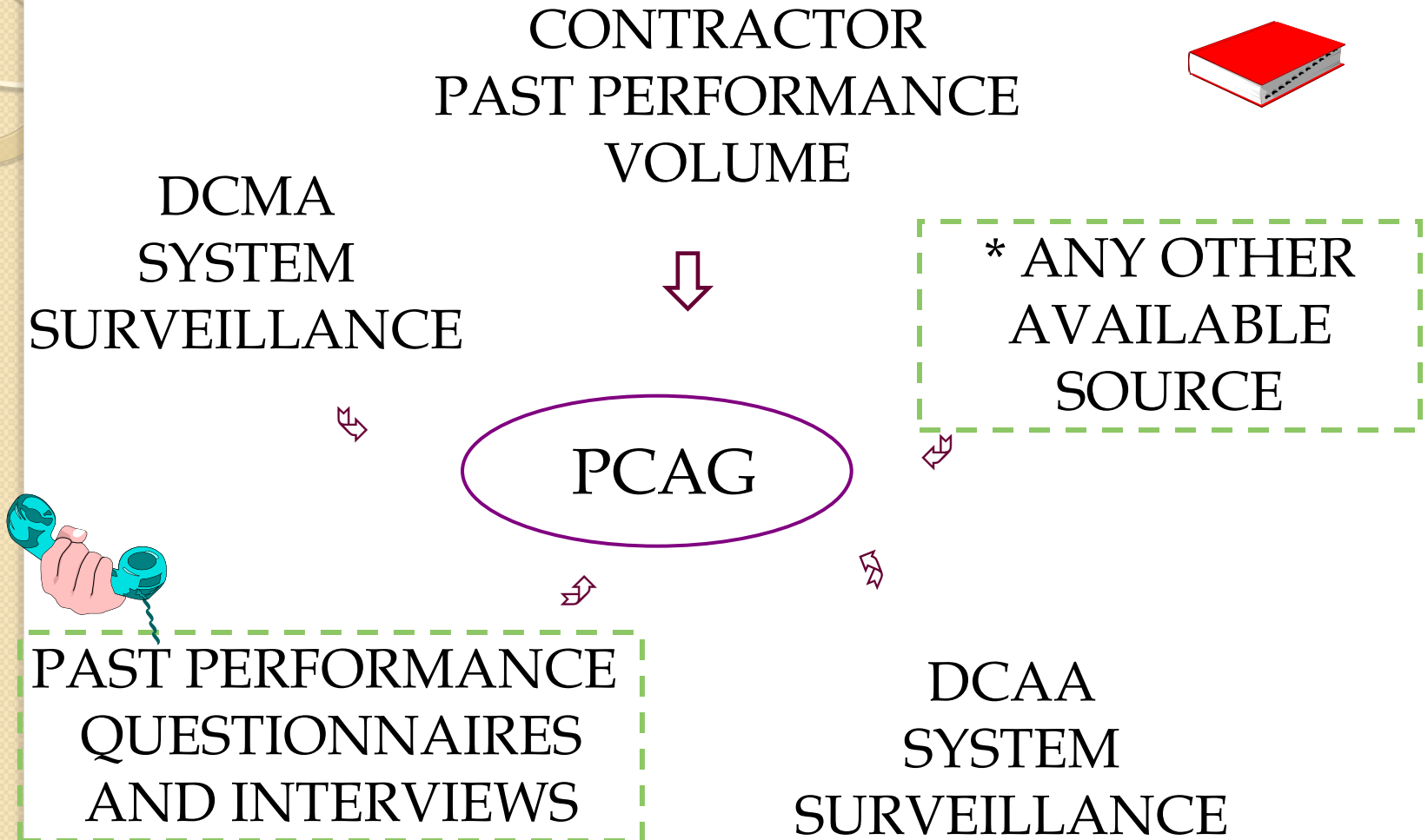
Disclaimer

- The information presented in this briefing is intended to generally illustrate how Past Performance Information is utilized in a source selection and therefore provide a better understanding of the importance Past Performance Information to a company wishing to compete on government acquisitions. The information presented does not reflect any specific source selection/evaluation, past present or future. When competing in a source selection, contractors should propose to the specific requirements of the solicitation for that requirement.

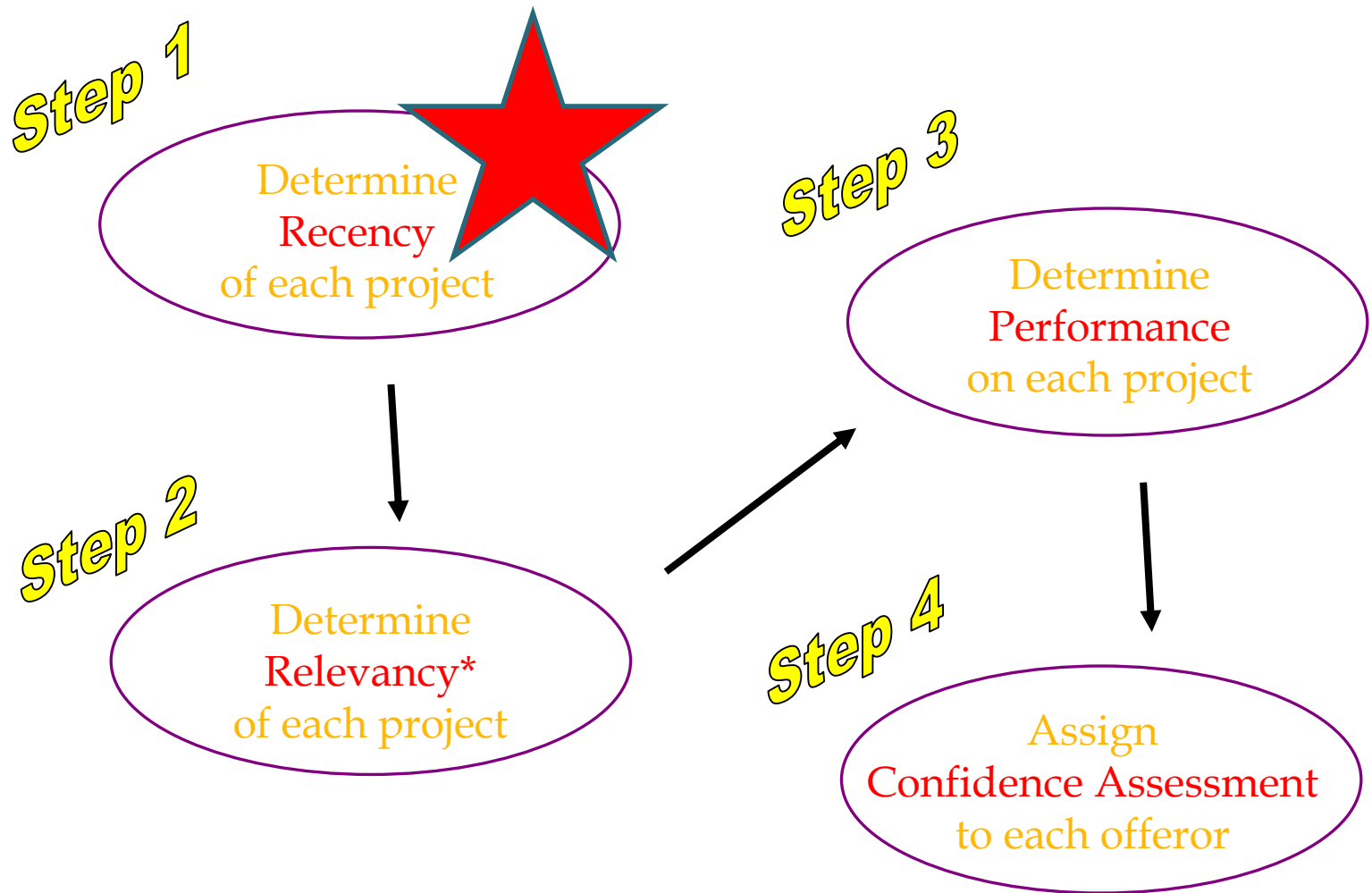


- Why is managing your Past Performance Important

Sources Of Information



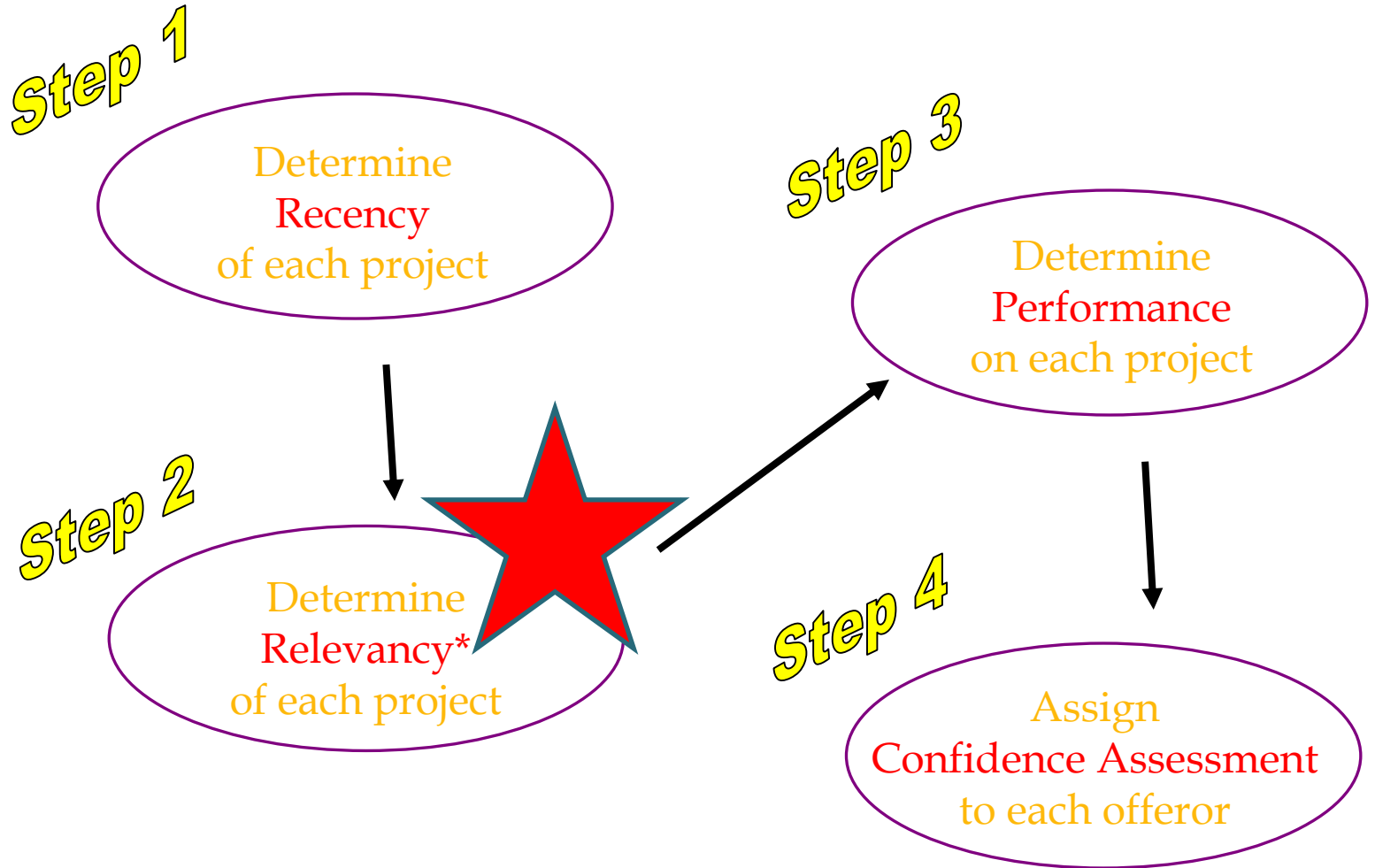
Evaluation Process



Recency

- Recency
 - Related to the period of time in the past that an effort can be considered in the evaluation
 - *Example: Previous 3 years from the date issuance of the solicitation*
 - Frequently requires at least 6 months of actual performance

Evaluation Process



Relevancy

- The determination of relevancy focuses on identifying aspects of an Offeror's present and past contracts, that are relevant to the requirement being solicited
- Relevant means sufficiently similar to the solicited requirement/acquisition that establishes indicators of expected performance
- Relevant does not mean the same or identical product or service

PP EVALUATION

step 1

Determine
Recency
of each project

step 2

Determine
Relevancy*
of each project

step 3

Determine
Performance
on each project

step 4

Assign
Confidence Assessment
to each offeror



Performance Evaluation

- Areas typically considered - history of forecasting/controlling costs, adherence to schedules, reasonable/cooperative behavior, commitment to customer satisfaction, business-like concern for customer's interest, etc...

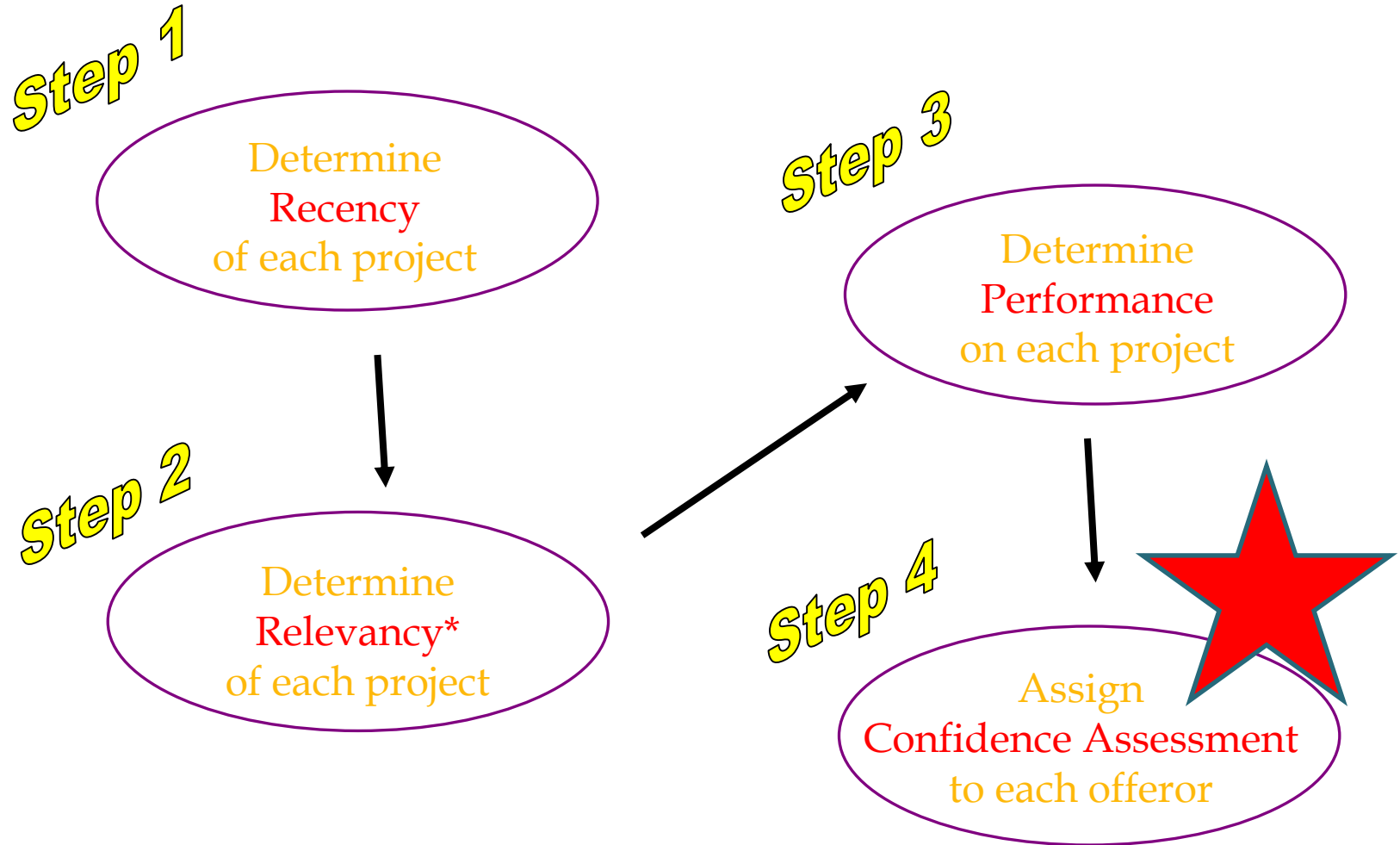
Performance Evaluation

- Performance Questionnaires
 - Sent to POC's on contracted efforts
 - References provided and Discovered efforts
 - Generally ask for an "Overall Rating"
 - Typical Performance Ratings (*Including Overall Assessment*)
 - Exceptional
 - Satisfactory
 - Unsatisfactory
 - Very Good
 - Marginal
 - Not Applicable

Performance Evaluation

- Interviews
 - Can be focused or general
 - Tend to follow the questionnaire
 - Generally ask for an Overall Rating

Performance Assessment



Performance Assessment

- A more relevant past performance record may receive a higher confidence rating and be considered more favorably than a less relevant record of favorable performance
- Offerors without a record of relevant past performance or for whom information on past performance is not available will not be evaluated favorably or unfavorably on past performance and, as a result, will receive a “Neutral/Unknown Confidence” rating

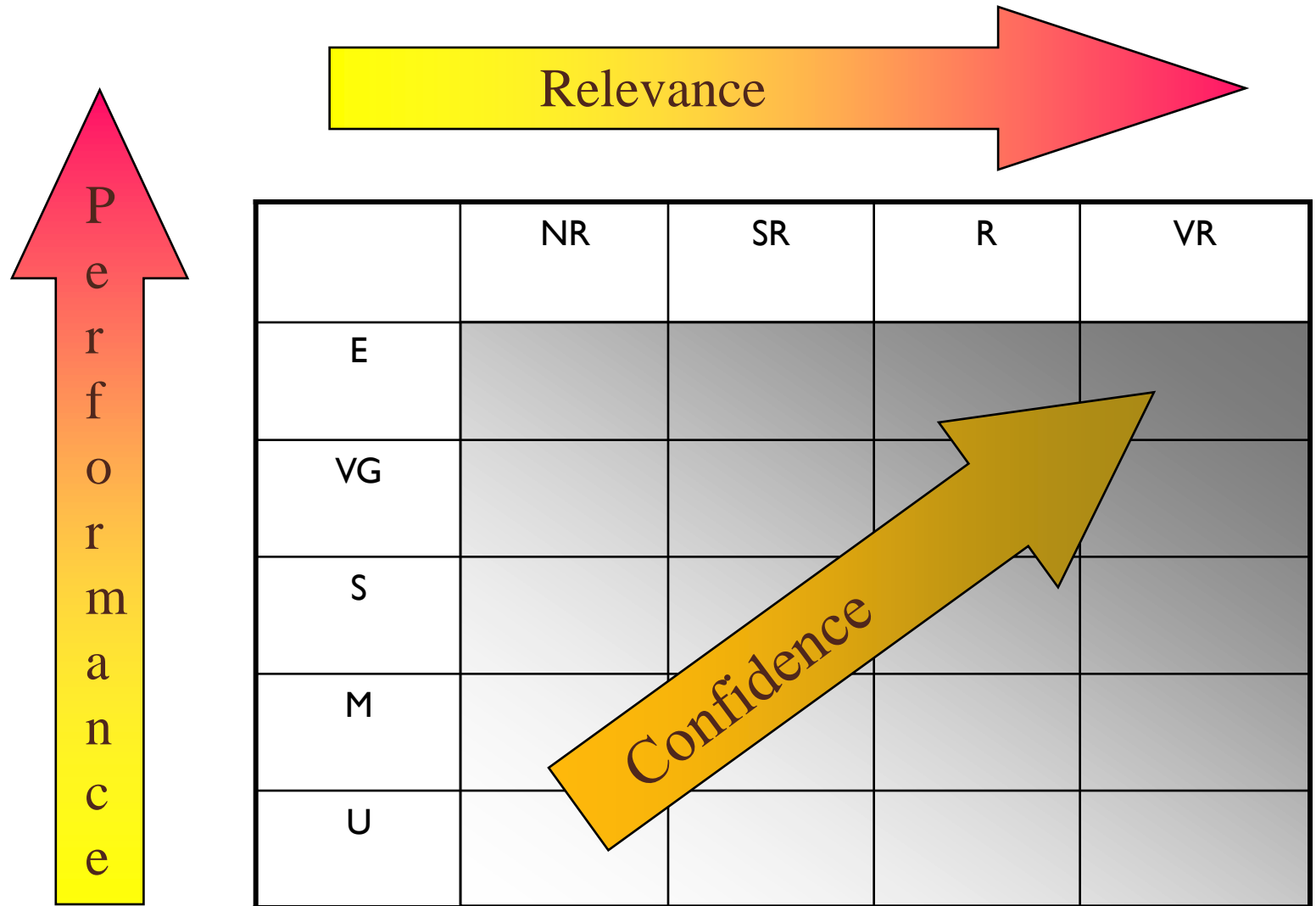
Performance Assessment

- In integrating recent and relevant past performance of the prime and teaming partners, the overall rating may be impacted by the amount and type of work proposed by each entity
- A strong record of relevant past performance may be considered more advantageous than a “Neutral/Unknown Confidence” rating

Sample Assessment Ratings

PERFORMANCE CONFIDENCE ASSESSMENT RATING	DEFINITION
Substantial Confidence	Based on the offeror's performance record, the government has <u>high expectation</u> that the offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the offeror's performance record, the government has <u>an expectation</u> that the offeror will successfully perform the required effort.
Limited Confidence	Based on the offeror's performance record, the government has <u>a low expectation</u> that the offeror will successfully perform the required effort.
No Confidence	Based on the offeror's performance record, the government has <u>no expectation</u> that the offeror will be able to successfully perform the required effort.
Unknown Confidence	No performance record is identifiable or the offeror's performance record is so sparse that no confidence assessment rating can be reasonably assigned.

Evaluation Premise



Adverse Past Performance

WHAT IS ADVERSE PAST PERFORMANCE?

- PP information that supports a less than satisfactory rating on any evaluation aspect (Marginal or Unsatisfactory)
- Any unfavorable information received from sources without a formal rating system
- Negatively impacts an offeror's rating

Adverse Past Performance

If Adverse Past Performance; Gov't Teams Should

- Consider the number and severity of the problems
- Consider the appropriateness and effectiveness of any corrective actions completed (not just planned or promised)
- Review recent contracts or performance evaluations to
 - Ensure corrective actions have been implemented
 - Evaluate effectiveness of corrective actions
- Ensure the Offeror has had opportunity to respond
- Evaluate Offeror's response and document

Adverse Past Performance

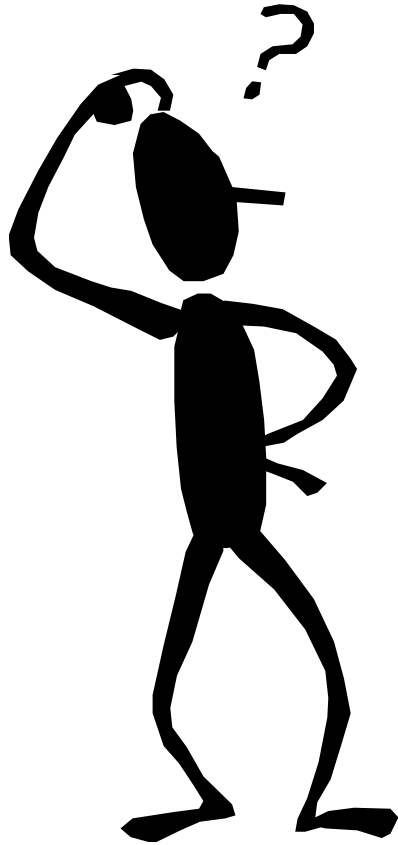
- Evaluation Teams **SHOULD NOT** use Adverse Past Performance information if the offeror is unaware of it or has not had the opportunity to respond to it

CPARS

- Contractor Performance Assessment Reporting System
 - Contracts valued greater than \$1M should have a CPARS record
 - The primary purpose of the CPARS is to ensure that current and accurate data on contractor performance is available for use in source selections
 - A tool used to communicate contractor strengths and weaknesses to source selection officials
 - Should be an objective report of the performance during a period against the contract requirements
 - Contractors have the opportunity to review and respond to their assessment

Review

- Past Performance Information
- How PPI is Utilized/Evaluated
- General Assessment
- Contractor Performance Assessment Reporting System (CPARS)



Questions